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FOR AGRICULTURE FAS, FCA, MEEKER

CINCPAC PLEASS PASS CONSUL GENERAL CHARLES CROSS

FROM AGRICULTURAL OFFICER

E.O. 11652: NA

TAGS: EAGR, CH

SUBJECT: PRC--GRAIN ESTIMATES FOR 1974 AND 1975

REFS:

(A) STATE 003836; (B) 75 HONG KONG 15282; (C) 75 HONGKONG 14689;
(D) 75 ROME 17805;(E) 75 HONG KONG 14384; (F) 75 HONG KONG 13520;
(G) 75 TOFAS 195; (H) 75 HONG KONG 10242; (I) 75 HONG KONG 7374;
(J) 75 TOFAS 90; (K) 75 HONG KONG 2157; (L) 74 HONG KONG 13874

BEGIN SUMMARY: WITH CHINA'S TOTAL GRAIN

PRODUCTION FOR 1974 AND 1975

CLAIMED OR ESTIMATED AT LEVELS SIGNIFICANTLY

HIGHER THAN THOSE OF A FEW

YEARS AGO, 275 AND 289 MILLION METRIC TONS RESPECTIVELY,

QUESTIONS HAVE

BEEN RAISED AS TO THE POSSIBILITY AND THE

PROBABILITY OF CHINA INCREASING

ITS GRAIN PRODUCTION AT THE RATES REQUIRED TO

PRODUCE SUCH HIGH LEVELS

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OF PRODUCTION. ALSO, A SUGGESTION HAS BEEN MADE THAT SOYBEANS NOW COMPRISE A SHARE OF CHINA'S TOTAL "GRAIN" PRODUCTION. IN RESPONSE, CONGEN'S AGRICULTURAL OFFICE HAS RE-EXAMINED AVAILABLE MATERIALS AND INFORMATION ON WHICH A NUMBER OF THE REFERENCED CABLES WERE BASED, AND CONCLUDE THAT THE ABOVE-STATED LEVELS OF GRAIN PRODUCTION ARE BOTH POSSIBLE AND PROBABLE AND ALSO THAT THERE IS NO EVIDENCE TO INDICATE SOYBEAN PRODUCTION AS A COMPONENT OF THOSE TOTAL GRAIN FIGURES. END SUMMARY.

1. IN ASSESSING ESTIMATES AND CLAIMS OF PRC'S TOTAL GRAIN PRODUCTION FOR 1974 AND 1975, AS REPORTED IN REFS, B,C,D,E, F AND G, CERTAIN WASHINGTON CONSUMERS APPARENTLY NOW QUESTION THE FOLLOWING: (A) THE LEVELS OF GRAIN PRODUCTION FOR 1974 AND 1975; (B) THE APPARENT DISPARITY BETWEEN OFFICIAL STATEMENTS CONCERNING 1974 GRAIN PRODUCTION; (C) THE LARGE RATES OF INCREASE OVER EACH PREVIOUS YEAR WHICH WOULD BE REQUIRED TO REACH THOSE LEVELS; AND (D) WHETHER OR NOT CHINA'S SOYBEAN CROP HAS NOW BECOME A COMPONENT OF CHINA'S TOTAL GRAIN PRODUCTION STATISTICS, WHETHER OR NOT THOSE STATISTICS ARE OFFICIAL CLAIMS (AS IN 1974) OR ESTIMATES OF THE HONG KONG CONSULATE GENERAL'S AGRICULTURAL OFFICE (AS IN 1975).

2. AN ATTEMPT IS HEREIN MADE TO REASSURE WASHINGTON END-USERS THAT BOTH THE 1974 FIGURE OF 274.9 MILLION METRIC TONS (MMT) AND THE 1975 ESTIMATE OF 289 MMT AND THE ESTIMATED RATES OF INCREASED PRODUCTION ARE NOT ONLY FEASIBLE, BUT THAT THE FIGURES COULD NOT REASONABLY INCLUDE SOYBEAN PRODUCTION FOR EITHER YEAR.

3. 1974 GRAIN PRODUCTION: IN DECEMBER 1974, CONGEN'S AGRICULTURAL OFFICE EXAMINED 1974 PERFORMANCE OF CHINA'S GRAIN SECTOR ON PROVINCE-BY-PROVINCE BASIS AND APPLIED RESULTS ON WEIGHTED BASIS, TO ESTABLISH AN ESTIMATED PERFORMANCE ON NATIONAL SCALE. RESULT WAS ESTIMATED 5.4 PERCENT INCREASE OVER 1973 GRAIN PRODUCTION WHICH HAD BEEN BOTH CLAIMED OFFICIALLY AND ESTIMATED INDEPENDENTLY AT APPROXIMATELY 257 MMT. THE RESULTING ESTIMATE OF 270-271 MMT OF GRAIN PRODUCED IN 1974 WAS REPORTED IN REF L ON DECEMBER 24, 1974. (SEE REF L ALSO FOR METHODOLOGY AND SOURCES OF OFFICIAL CLAIMS THAT PRC GRAIN PRODUCTION IN 1973 WAS EITHER 257 MMT OR 260MMT).

4. BECAUSE "ESTIMATES ARE ESTIMATES" (IE NOT PROVEN FACTS), LIMITED OFFICIAL USE

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AGRICULTURAL OFFICE SOME MONTHS LATER REDUCED 270-271MMT ESTIMATE FOR 1974 BY 2 PERCENT TO 265 MMT (STILL WELL ABOVE ANY WASHINGTON ESTIMATES) IN ORDER TO PROVIDE MORE ACCEPTABLE LEVEL FOR SOME END-USERS. AS IT TURNED OUT, ESTIMATE OF 270-271 WAS ONLY 1.4 TO 1.8 PERCENT BELOW OFFICIAL FIGURE GIVEN BY PRC DELEGATE AT NOVEMBER 1975 FAO CONFERENCE (SEE REF D), A FIGURE WHICH WAS ALSO REPORTED BY BRITISH JOURNALIST NEVILLE MAXWELL (SEE REF E),

5. THE APPARENT DIFFICULTY OF RECONCILING CLAIM OF 274.9 MMT WITH EARLIER OFFICIAL CLAIM THAT 1974 GRAIN PRODUCTION WAS 2.4 TIMES THAT OF 1949 WAS EXIMED IN REF C. THEAT ANALYSIS HAS SINCE BEEN FUTHER REFINED, AS FOLLOWS: MOST PROBABLE EXPLANATION OF 274.9 MMT AS EQUIVALENT TO "2.4TIME 1949" IS THAT 1949 BASE OF "SLIGHTLY MORE THAN 110 MMT" (AS QUOTED IN NOVEMBER 9, 1973 ENGLISH-LANGUAGE PEKING REVIEW), WAS IN FACT "SLIGHTLY MORE THAN" "I I, CH'EN WAN", THE CHINESE WAY OF EXPRESSING 110 MILLION, WHICH IS LITERALLY "ONE HUNDRED MILLION PLUS ONE THOUSAND TIME TEN THOUSAND". THE USE OF THAT TRADITIONAL, CUMBERSOME CHINESE ARITHMETICAL EXPRESSION PERMITS SEVERAL AREAS FOR ROUNDING (DOWN) OF FIGURES WHICH MAKE ENTIRELY FEASIBLE A 1949 GRAIN PRODUCTION OF 112.2 MMT WHICH, WHEN USED IN COMBINATION WITH 2.45 TIMES (ROUNDED DOWN, AS IS NORMAL CHINESE PRATICE TO 2.4 TIMES), GIVES THE 274.9 MMT CLAIMED FOR 1974. (THE COMPLEXITY OF THAT EXPLANATION SHOULD BOT BE GROUNDS FOR NOT ACCEPTING IT, BECAUSE IT IS BOTH LOGICAL AND PROBABLE, IN THE OPINION OF THE AGRICULTURAL OFFICE.)

6. 1975 GRAIN PRODUCTION: A PROVINCE-BY-PROVINCE APPROACH SIMILAR TO THAT USED IN THE ORIGINAL ESTIMATE FOR 1974 (REF L) WAS USED FOR 1975. IN ADDITON, ACROSS-CHECK APPROACH BY MAJOR CROP-GROUPS AND MAJOR INPUTS WAS MADE. RESULT, BASED ON INCREASES OVER THE LOWERED LEVEL OF 265 MMT FOR 1974, WAS AN ESTIMATED 277 MMT FOR CHINA'S 1975 GRAIN PRODUCTION SENT TO FAS/W ON NOVEMBER 11, 1975 (SEE REF F). ONE MONTH LATER, ON DECEMBER 12, WITH A HIGHER BASE (274.9 MMT) FOR 1974 AND ADDITIONAL INFORMATION ON PERFORMANCE IN 1975, ESTIMATES WERE SUCCESSIVELY REVISED UPWARDS TO 287.5 MMT (REF C) AND TO 289 MMT ON DECEMBER 31, 1975 (REF B) WHICH IS THE LATEST AGRICLUTURALOFFICE ESTIMATE ON CHINA'S 1975 GRAIN CROP SUBMITTED TO FAS/W.

7. RATE OF INCREASE: HOW DO ESTIMATES FOR 1973,1974, AND 1975 LIMITED OFFICIAL USE

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GRAIN PRODUCTION APPEAR WHEN CONSIDERED AS PERCENTAGE-INCREASE OVER PREVIOUS YEAR? FOLLOWING ARE AGRICULTURAL OFFICE FIGURES OF PRC GRAIN PRODUCTION FROM 1970 TO 1975, WITH PERCENTAGE-INCREASE OR-DECREASE OVER PERVIOUS YEAR. 1970--WRP MMT; 1971--246 MMT) PLUS 2.5 PERCENT); 1972--240 MMT (MINUS 2.4 PERCENT); 1973--257 MMT (PLUS 7.1 PERCENT); 1974--275 MMT (PLUS 7.0 PERCENT); AND 1975--289 MMT (PLUS 5.1 PERCENT). THE TOTAL INCREASE OVER 5-YEAR PERIOD ENDING IN 1975 IS 20.4 PERCENT, AND AVERAGE ANNUAL INCREASE OF 3.78 PERCENT. (INCIDENTALLY, THE TARGETED ANNUAL RATE INCREASE IN GRAIN PRODUCTION FOR THE NEXT FIVE-YEAR PLAN (1976-80) BY THE END OF WHICH CHINA HOPES TO PRODUCE 400 MMT OF GRAIN, IS DERIVED AS 7 PERCENT--THE SAME RATE AS THAT BELIEVED TO HAVE BEEN ACHIEVED IN 1973 AND 1974.) GETSINGER

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8. BETWEEN 1970 AND 1975, THE ESTIMATED AVERAGE ANNUAL INCREASE IN CHINA'S GRAIN PRODUCTION WAS APPROXIMATELY 10 MMT--BY NO MEANS AN IMPOSSIBLE CONSIDERING THE SHARPLY INTENSIFIED EFFORTS IN THE COUNTRYSIDE OVER THE PAST 3-4 YEARS IN PARTICULAR AND THE STEADY INCREASE IN MULTIPLE CROPPING. A MAJOR FACTOR ENSURING A HARVEST IN MANY AREAS IN SPITE OF DROUGHT HAS BEEN THE REMARKABLE INCREASE IN "NEW AND IMPROVED" IRRIGATION FACILITIES--APPROXIMATELY EIGHT MILLION HECTARES IN THE PAST TWO YEARS ALONE, ADDED TO THE AREA WHICH WAS LAREADY UNDER IRRIGATION. WORK ON DRAINAGE FACILITIES, AND INCREASED GRAIN PRODUCTION INPUTS ALSO STRENGTHENED CHINA'S ABILITY TO INCREASE GRAIN PRODUCTION. (SEE REF F FOR A BRIEF DISCUSSION OF THOSE FACTORS). THOSE AR AMONG THE FACTORS WHICH WERE CONSIDERED IN PRODUCING THE ASSESSMENTS WHICH ARE NOW BEING QUESTIONED BY SOME WASHINGTON END-USERS. IN THE OPINION OF THE AGRICULTURAL OFFICE, IT IS NOT REALISTIC NOT TO GIVE APPROPRIATE WEIGHT TO SUCH FACTORS WHEN MAKING ESTIMATES OF CHINA'S GRAIN PRODUCTION.

9. SOYBEANS AS "GRAIN"? THAT QUESTION IS RAISED IN REF A AND

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BY OTHERS IN WASHINGTON. IN THE OPINION OF THE AGRICULTURAL OFFICE, THAT WAS A VALID QUESTION IN THE MID-1950'S BUT IS NO LONGER A VALID QUESTION FOR TWO REASONS: (A) THE METHODS OF ESTIMATING CHINA'S GRAIN PRODUCTION OVER THE PAST 2-3 YEARS, AND THE RESULTS OBTAINED, ARE CONSIDERED SOUND AND REASONABLE BY THIS OFFICE. THE TOTALS GIVEN ABOVE INCLUDE RICE, WHEAT, CORN, BARLEY, GRAIN SORGHUM, OATS, OTHER COARSE GRAINS, THE PULSES (FILED PEAS AND BROAD BEANS) AND POTATOES (AT 4:1 "GRAIN" EQUIVALENT); THEY DO NOT INCLUDE SOYBEANS: (B) SOYBEANS HAVE NOT BEEN INCLUDED AS A "GRAIN" SINCE 1957, TO THE BEST OF OUR KNOWLEDGE. (THE SUGGESTED LEVEL OF SOYBEAN PRODUCTION OF 15-20 MMT AS A COMPONENT OF 1974 GRAIN PRODUCTION WILL ALSO BE CONSIDERED BELOW).

10. IN TEN GREAT YEARS. PRC'S OFFICIAL GRAIN AND SOYBEAN PRODUCTION STATISTICS FOR 1949 THROUGH 1958 ARE LISTED IN SEPERATE TABLES; I.E., THEY ARE NOT COMBINED. HOWEVER, DURING THE EARLY AND MID-1950'S WHEN GRAIN AND SOYBEANS WERE OFTEN LUMPED TOGETHER IN ONE FIGURE MAINLY AT THE PROVINCIAL LEVEL, THE COMBINED CROPS WERE IDENTIFIED AS "GRAIN CROPS INCLUDING SOYBEANS". TWO REASONS FOR THAT: (A) SOYBEANS WERE INCULDED AS "ANOTHER GRAIN" IN STATE DELIVERY QUOTAS: AND (B) SOYBEANS WERE CONSIDERED AS "A STAPLE FOOD GRAIN" IN CERTAIN MAJOR PRODUCING AREAS.

11. BY 1957, SOYBEANS WERE NO LONGER INCLUDED IN STATISTICS AS A "GRAIN"; NOR AS AN OILSEED FOR THAT MATTER. THEY WERE LISTED INDEPENDENTLY AND THEY HAVE BEEN SO TREATED EVER SINCE. AMONG REASONS FOR THAT DEVELOPMENT IS THE FACT THAT SOYBEANS ARE LOW-YIELDING RELATIVE TO MOST GRAIN CROPS AND PEASANTS IN MAJOR SOYBEAN AREAS COMPLINED AT THE INCLUSION OF SOYBEANS IN STATE DELIVERY QUOTAS AS "GRAIN".

12. FUTHER, IN 1958 THE STATE COUNCIL ORDERED CHINA'S SOYBEAN AREA TO BE REDUCED FROM 12 MILLION HECTARES (M.HA.) TO 10 M. HA. THIS REDUCTION IN PLANTED AREA, WHICH WAS TO BE EFFECTED IN THOSE CERTAIN AREAS REFERRED TO ABOVE, ELIMINATED SOYBEANS FROM THE LIST OF STAPLE FOOD GRAONS--ANOTHER REASON FOR SEPERATING SOYBEANS FROM GRAIN. WITH THE GRAIN CROP DISASTERS OF 1959-61, THE AREA PLANTED TO INDUSTRIAL CROPS WAS DRASTICALLY REDUCED AND THE AREA PLANTED TO SOYBEANS IS BELIEVED TO HAVE BEEN SHARPLY

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REDUCED AS WELL, ESPECIALLY BECAUSE IT IS A LOW-YIELDING CROP AND

OPTIMUM YIELDS AND PRODUCTION OF FOOD CROPS WERE GOALS OF THE HIGHEST PRIORITY; I.E. TO PRODUCE MORE GRAIN ("REAL GRIN). AS A RESULT, IT IS BELIEVED THAT SOYBEAN ACREAGE MAY HAVE DECREASED TO ONLY 7-8 M. HA. OR EVEN LESS.

13. ALTHOUGH SOME RECOVERY HAS UNDOUBTEDLY BEEN MADE SINCE THEN, IT IS DOUBTED IF VERY MUCH RECOVERY HAS IN FACT TAKEN PLACE. MOST OTHER INDUSTRIAL CROPS HAVE NOT RECOVERED THE GROUND LOST IN THE EARLY 1960'S. CURRENTLY, CHINA'S IMPORTANT CROPS, SUCH AS COTTON, SUGAR, AND SOYBEANS, ARE STILL ON LAND AREA MORE THAN TEN PERCENT BELOW THAT OF 1957* AND GIVEN THE LOW YIELDS OF SOYBEANS, RECOVERY PROBABLY HAS BEEN AND WILL BE EVEN SLOWER.

14. THOSE AND OTHER FACTORS WERE CONSIDERED IN ESTIMATING CHINA'S SOYBEANS PRODUCTION OVER THE PAST 2-3 YEARS (SEE REF J). ON MAY 23, 1975, THE CONGEN'S AGRICULTURAL OFFICE SUBMITTED A SOYBEAN PRODUCTION ESTIMATE OF 7.1 MMT FOR 1974. IN FAS/W'S FOREIGN AGRICULTURAL CIRCULAR FOP 7-75 (PAGE 14). PRC SOYBEAN PRODUCTION ESTIMATES ARE EVEN LOWER--6.75 MMT FOR 1974 AND THE SAME FOR 1975. ERS USES 7.0 MMT FOR 1974. IT APPEARS THEREFORE, THAT WITHIN USDA AT LEAST, ANALYSTS ARE CONVINCED THAT PRC'S SOYBEAN PRODUCTION IN 1974 DID NOT EXCEED 7 MMT.

15. A SUGGESTION HAS BEEN MADE THAT UP TO 15-20 MMT OF CHINA'S OFFICIALLY CLAIMED 274.9 MMT OF GRAIN FOR 1974 MUST BE SOYBEANS. IF THAT WERE THE CASE, IT WOULD MEAN THAT CHINA'S SOYBEAN PRODUCTION IS 2 TO 3 TIMES LARGER THAN MOST SPECIALISTS HAVE THOUGHT PROBABLE. IT WOULD ALSO MEAN THAT CHINA'S SOYBEAN ACREAGE HAS RECENTLY DOUBLED OR TRIPLED, UNNOTICED BY CHINA ANALYSTS. FURTHER, IT WOULD MEAN THAT CHINA HAS BEEN ABLE TO MAKE SIGNIFICANT HEADWAY IN EXPANDING PRODUCTION OF A CROP WELL-KNOWN FOR THE DIFFICULTIES WHICH IT PRESENTS IN INCREASING YIELDS, WHILE AT THE SAME TIME FAILING IN ITS ALL-OUT EFFORT DEVOTED TO EXPANDING ITS GRAIN PRODUCTION. THERE IS A CONSIDERABLE BODY OF EVIDENCE INDICATING THAT THAT IS NOT LIKELY, INCLUDING THE SHARPLY REDUCED GRAIN IMPORTS IN 1975 (TO MENTION A PERIPHERAL INDICATOR).

16. CONCLUSION: IN THE OPINION OF CONGEN'S AGRICULTURAL OFFICE, THERE ARE SUBSTANTIAL GROUNDS (AS OUTLINED IN A NUMBER OF THE LIMITED OFFICIAL USE

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REFERENCED CABLES) TO SUPPORT ITS PREVIOUSLY SUBMITTED ESTIMATES OF CHINA'S GRAIN PRODUCTION FOR 1974 AND 1975. ALSO, THERE ARE NO INDICATION THAT SOYBEANS PRODUCTION IS AT THE HIGH LEVELS SUGGESTED OR THAT SOYBEANS ARE NOW INCLUDED BY THE CHINESE IN THEIR FIGURES FOR TOTAL GRAIN PRODUCTION. GETSINGER

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